ServCat
Guidelines for Searching

There are three ways that you can search:

- **Quick Search** – Conduct a simple broad search by information groups (e.g., documents, datasets, etc.), word phrase (e.g., "waterfowl"), and Organization.
- **Advanced Search** – Develop a detailed and customized query to find exactly what you need.
- **Reference Code(s)** – Search by a known existing reference code(s).

SEARCH TYPE: QUICK

This search is geared to someone wishing to quickly conduct a general search for all types of information, most often specific to an Organization.

- Select Search from the Menu items>References>Quick option
- Select Reference Type Group from the dropdown

Reference Type Group

ServCat allows users to narrow search results by Reference Type Group:

- o Datasets – All types of tabular and spatial data
- o Documents –All synthesized and written information, including reports, journal articles, books, book chapters, notes, etc.
- o Geospatial Datasets – All types of natively geospatial data (e.g., geodatabases, satellite images, etc.)
- o Multimedia – All photos, audio, and other types of non-traditional media (e.g., movies)
- o Projects – All projects
- o Web Resources – Any information resource whose primary means of conveying information is through the use of the internet

If you Select ALL, you will not filter your search by the type of information. *(Note: "All" is the default)*

If you wish to search for specific types of information (e.g., you want to search specifically for unpublished reports), you will need to use the Advanced Search.

Search Text

This helps narrow the search by a word or phrase. All text entered is treated literally. The text search behaves like other search engines, that is, quotes, operators (and, or, not) and parentheses can be used.

- Enter a word or phrase in the "Search Text" box

Organization(s)

There are three organization filters available from the Quick Search page, Region, Organization Types and Search. These filters control which organization are displayed in the organizational pick list.

Region

By default, the Region filter is set to "All". If a region is selected from the dropdown list, then the organizational pick list will be filtered by that selected region.

- Select the Region from the dropdown list

Organization Types Displayed

Fish and Wildlife organizations have been grouped into nine categories. By default, the Organization Type is set to "Refuges".

- Select the Organization Type from the dropdown list

Search box

The Search box is located above the organizational pick-list. This allows the user to filter organizations displayed. If you check the "Include Linked Units" option you will get all the related Organizations. *(Note: This is the default)*

- Enter the Organization name in the Search box
- Drag or use the control buttons to place Organization name(s) in the selection pane
- Click on the "Search" button at the bottom right

Results

A brief citation is displayed in the results panel. *(Note: This applies to all three search types)*

- Click on any "Display Citation" or "Title" of any of these references to view the record profile

- Hover over any column heading, and click on the down arrow to sort the results ascending or descending
- Hover over any column heading, click on the down arrow, and then select "Columns" to display additional fields in the results
- Click on the down arrow next to "Expand Panel to Revise Search Definition" to revise the search

SEARCH TYPE: ADVANCED

The advanced search provides flexibility in how you search and is intended to narrow your results to just a few References meeting your specific search criteria.

- Select Search from the Menu items>References>Advanced option

There are twelve ways you can narrow your search results, each of which has its own section. The following search filters are provided;

- Reference Type Groups – limits search results to a specific group type (mentioned above in Quick Search)
- Search Fields – limits search results to specific Reference attributes (e.g. abstract, title, keyword, date) *(Note: You can also select Operators "containing" "not containing", "exactly matches", or "starts with" from the dropdown list to further refine your search)*
- Regions & Organizations – limits search results to selected Regions and/or Organizations
- Map – limits search results for all References that intersect geographically with the bounding area of the Reference
- Reference - Organization Lifecycles – limits search results by the state of the organizational link (Pending, Approved, Denied)
- Reference Types and Specific Fields – limits search results to specific Reference Types (e.g. book, dissertation, unpublished report) and their associated attributes (e.g. book edition, University, abstract)
- Online Resources – limits search results to References with available digital files
- Reference Visibility – limits search results by Reference's visibility (internal or public)
- Holding Locations – limits search results to References with physical holdings, an external resource, a digital file, or a cross reference
- Reference Lifecycle – limits search results by the Reference's lifecycle (Legacy, Active, In Review)
- Collections – limits search results to References in a specific collection

Notes:

- You must specify a criterion in <u>at least one</u> of these sections to run a search.

- You can exclude a section at any time by checking the exclude option. This allows you to keep your search criteria within a section but not use them for a specific search.
- Only Public and Internal References are returned with this search.
- You can add as many filters as you want and can also specify whether they are intersected or unioned (i.e. AND, OR, AND NOT).
- Searching Reference Lifecycle: "Draft", "Quarantined", and "Inactive" are not options because References with these lifecycle states always have a visibility of "Restricted" and are, therefore, never returned in the Advanced Search.

Saving Your Searches

Saved searches allow any FWS user to save one or more search criteria that are defined in the Advanced Search. Once saved, the user can repeat the exact same search or share the search with others, regardless of whether they are with FWS or public.

The following concepts and rules apply to saved searches:

- Any FWS user can create one or more saved searches; currently, there is no limit on the number of saved search a user can create
- You are the Owner and therefore may edit or delete the saved search; currently, there is no way to share ownership
- For a specific user, the name of the search must be unique. However, names must not be unique across all users.
- The results returned in saved searches are dynamic and likely to change over time.
- The number of records returned in a search will depend on whether the person running the search is internal to FWS or is using the public portal.
- You may call anyone else's saved search at any time if you know the unique numeric search code.
- Only References that have a visibility of Public and/or Internal will be returned. Currently, there is no way to save searches that would return References that have a visibility of Restricted.
- Once you remove a saved search, it is gone forever. Anyone attempting to call the search will not be successful.

Creating a Saved Search

Creating a saved search is as simple as specifying your search criteria, clicking on the save current selected option, and giving your search a unique name.

- Click on the "Expand Panel to Revise Search Definition" down- arrow
- Select "Save Current Selections"

- Enter name for the custom search (Note: to edit the name of a saved search click on the title)
- Select Submit

SEARCH TYPE: REFERENCE CODE(S)

This search will search for a specific Reference, using its unique Reference Code. You can specify up to 2000 Reference Codes as long as they are comma delimited.

- Select Search from the Menu Items>References>By Reference Code
- Enter the comma separated Reference Code(s)
- Click the Search button in the lower right-hand corner